7 Key Steps to Systematize Your Practice

SPECIAL REPORT

Tips to develop a more predictable, scalable and successful practice.

vision
financial marketing

How Systematic is **Your Practice?**

Dear Advisor & Friend,

My company, Vision Financial Marketing, provides a powerful CRM & automated marketing solution for hundreds of advisors across the country. It's also our goal to provide you with ongoing knowledge and information that you can benefit from, which is the reason that we created this Special Report for you.

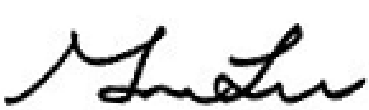
A topic that we feel is critical to advisors' success, but often overlooked, is in the area of systematization of your practice. For example:

- ❑ What mindset do you need to achieve systematization?
- ❑ What can you do to build repeatable processes and create structure?
- ❑ What steps can you take to implement these ideas effectively in your practice?

This Special Report will help you understand these topics better and give you immediately actionable tips that you can implement in your practice.

I hope you find this information useful and that you consider exploring everything that our platform, Vision Financial Marketing, can offer you.

Sincerely,



Gabriel Lewit
CEO & Co-Founder
Vision Financial Marketing

STEP #1

1 Think Systematically

It's important that you start thinking in terms of systems. "Systems" have a defined set of processes with duplicatable results. The most successful advisory firms have everything systematized. This eliminates room for error and mistakes. Think systematically and grow!

STEP #2

2 Use a CRM Software

An advisory practice is only as good as its' CRM usage and implementation. Successful advisors use their CRM every single day. More importantly, they use them in a manner that breeds success. They view the right data, they run the right reports and they focus on the right things.

STEP #3

3 Establish Workflows

Once you start thinking systematically, translate these systems into workflows. Build these workflows into your CRM. Assign the right steps to the right team members. With a good workflow, you can assess the status of every client, at any stage at any time you need to. It creates powerful efficiencies and team effectiveness.

STEP #4

4 Create Templates

Prospecting emails? Create a template. Client service letters? Create a template. New client materials? Create a template. The more templated your business, the more systematic you will be. New employees can learn templates easily, cover for sick employees if they're out, and much more. Templates are one of the keys to success.

STEP #5

5 Create Scripts

How about those verbal processes that you can't build in to your workflows? For example, the scripts that you have your team members use on the phone? What your receptionist says when someone walks in the front door? Scripts are a form of templates, but for verbal content.

STEP #6

6 Implement Automation

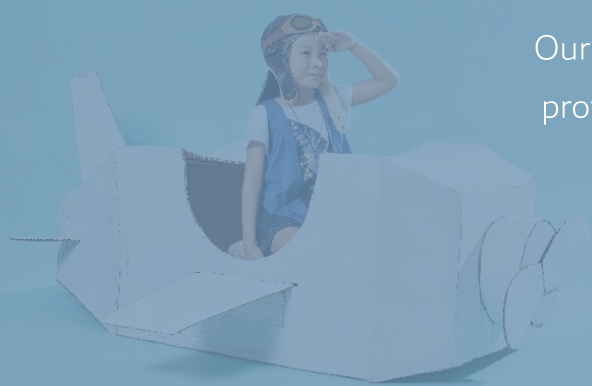
What's better than a well trained, scripted and templated team? Automation. That's when no team member even needs to touch something. Instead, it just happens on it's own. The right CRM system and the right automation software can help make this dream a reality!

STEP #7

7 Reinforce Structure

The best systems in the world only work if you and your team implement these best practices. Reinforce these concepts in your weekly team meetings, your ongoing training with your team and whenever you meet together. The more you reinforce this concept, the better your success.

See the **Vision**



Our vision is to provide 100,000 financial advisors and professionals with a transformational, fully-integrated, fully-automated business and marketing system.

Join the Movement Today | #VFMVision

Ready to **See Your Practice Prosper?**

Vision Financial Marketing provides your practice with unparalleled, cost-effective CRM software, marketing automation, branding services and website design.

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